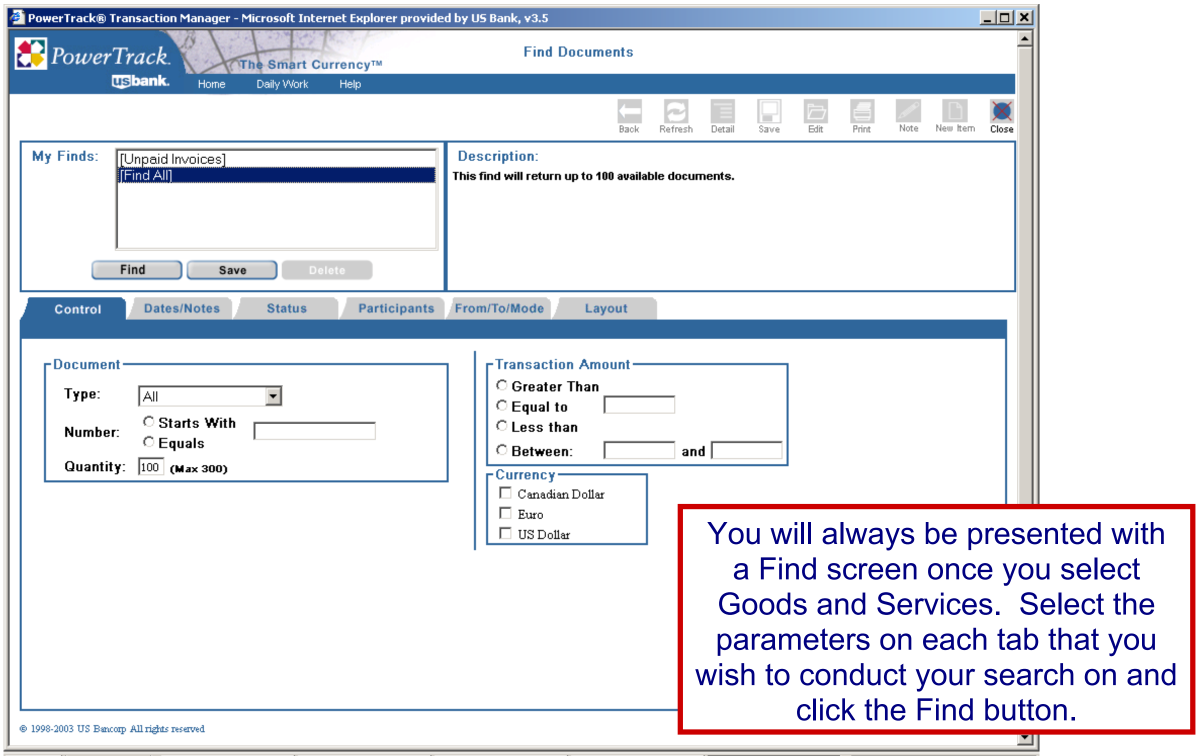
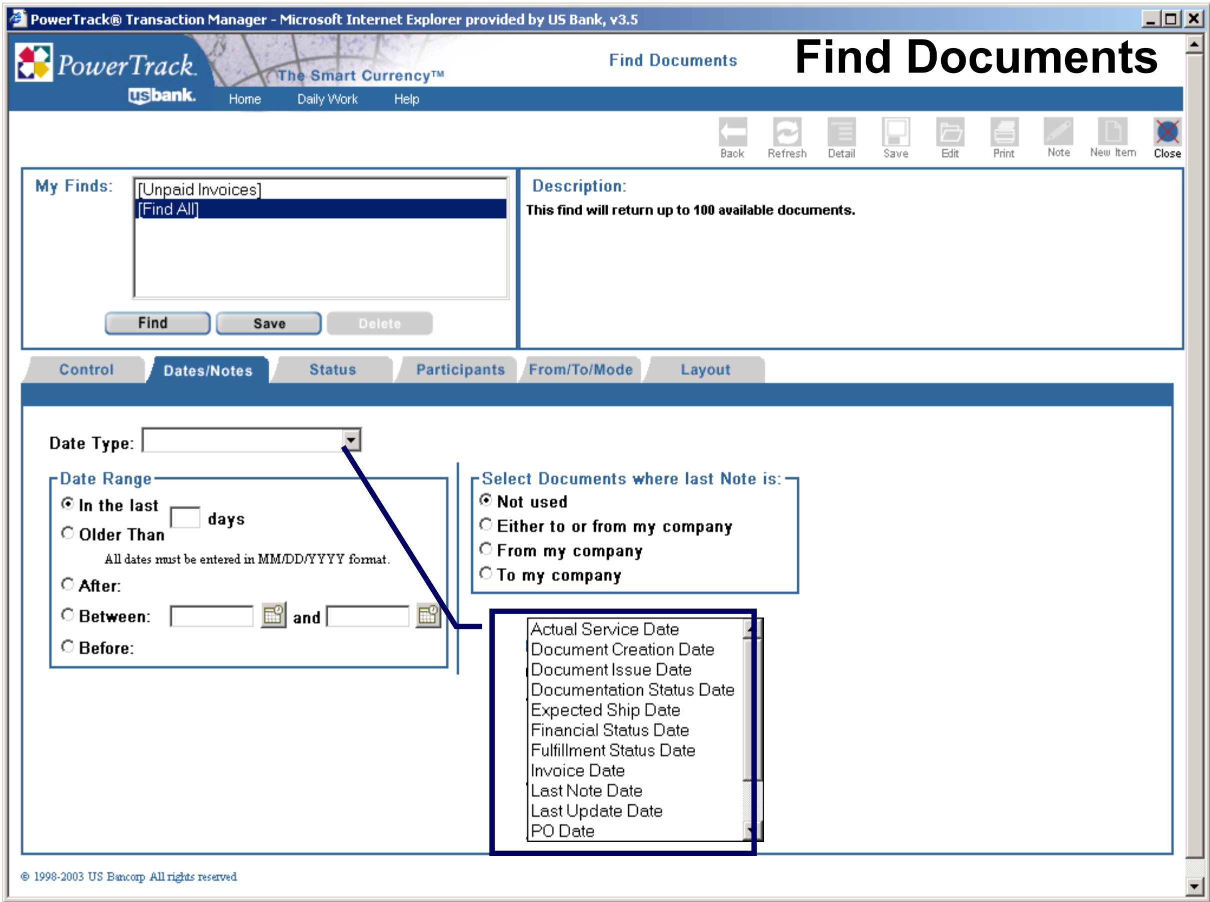
6.0 – Using the Find Documents Features

Once you have launched PowerTrack and selected 'Household Goods" to begin working with invoices you will always be presented with the 'Find Documents' screen. PowerTrack allows for very simple searches and the ability to search by document, date, status, participants, origin and destination. How to do that is discussed in this section. An example of the find screen is below.

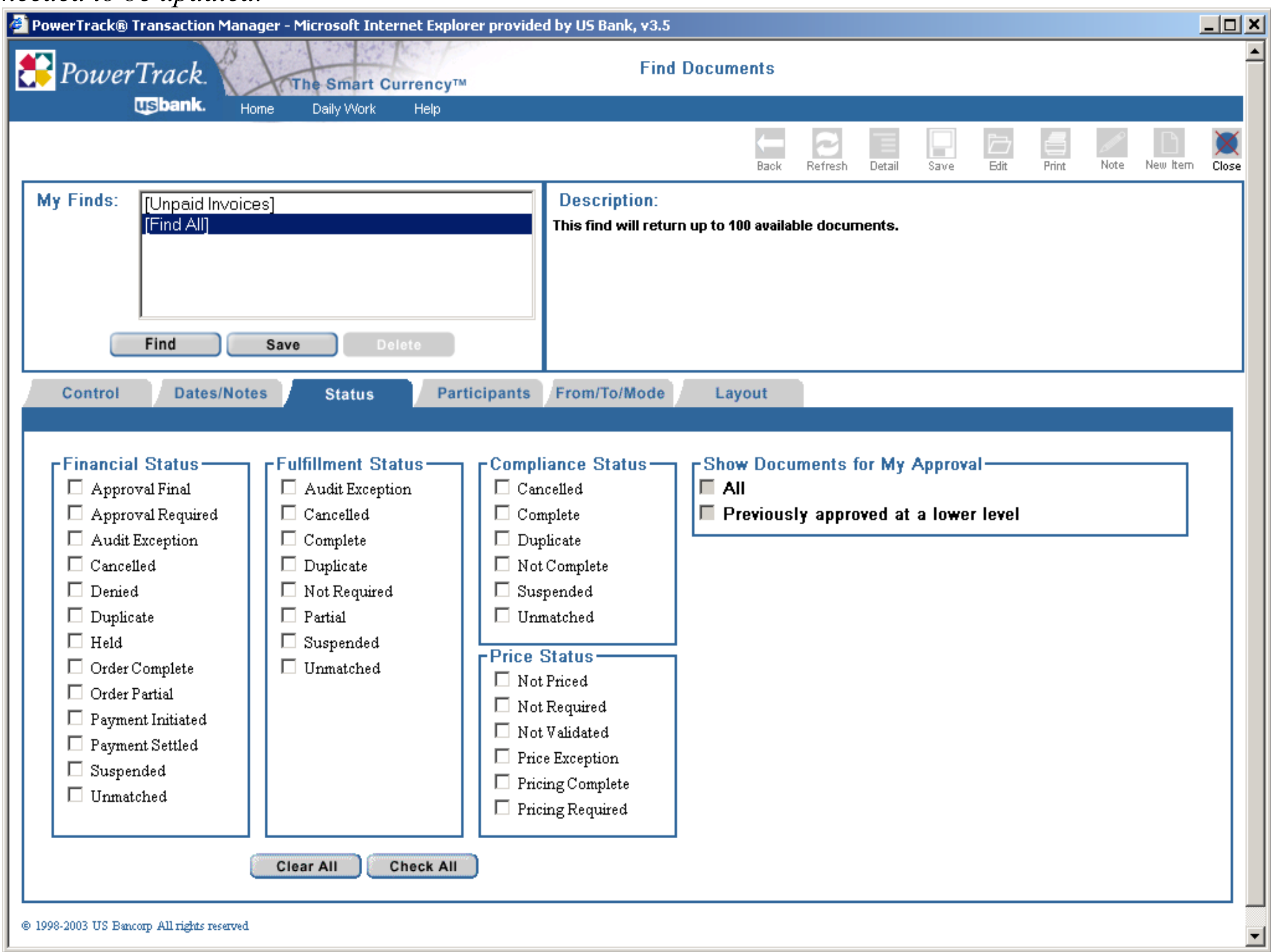


The Dates/Notes tab is pretty self explanatory, allowing you to search for documents by dates and notes. You can search for all documents with Notes to my company, from my company, etc.



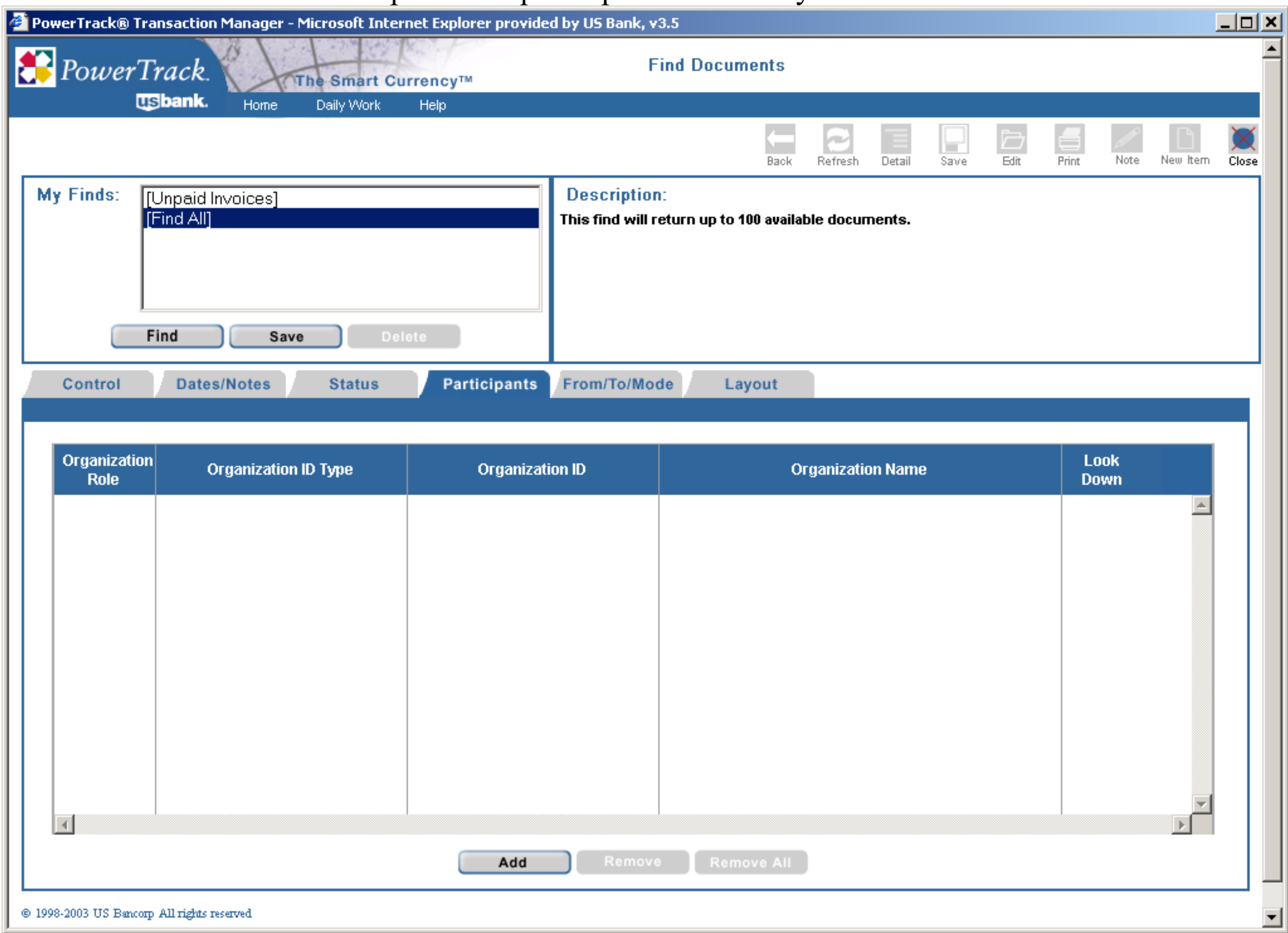
You have the ability to search for documents by status. Each document has four statuses.
Financial – think of this status in relation to the money (this status affects the invoice).
Fulfillment – (not used by HHG)
Compliance – this status is relative to the actual movement (the Transit Status).

Every day Sellers should search for Audit Exceptions, Unmatched and Compliance Statuses needed to be updated.

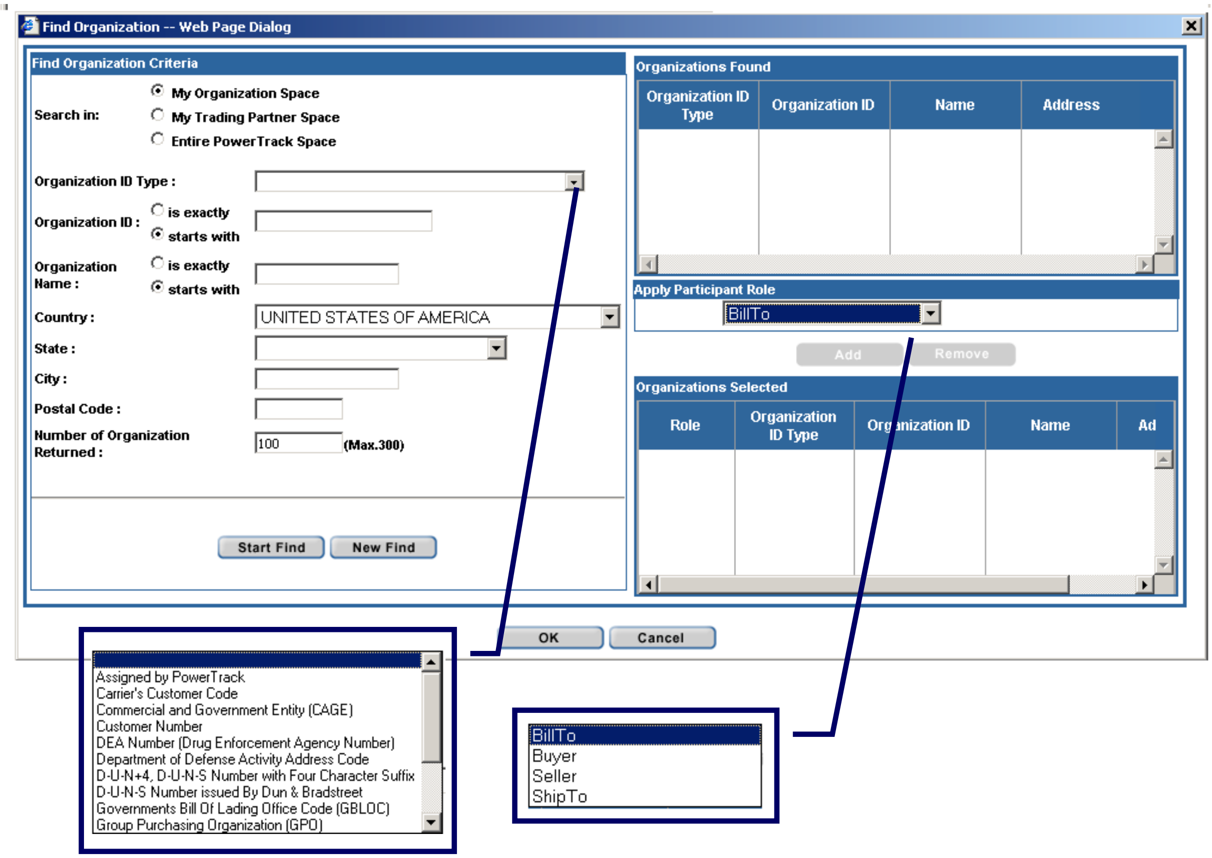


You also have the ability to search for transactions by participants (i.e., selling party, buying party, bill to, etc.).

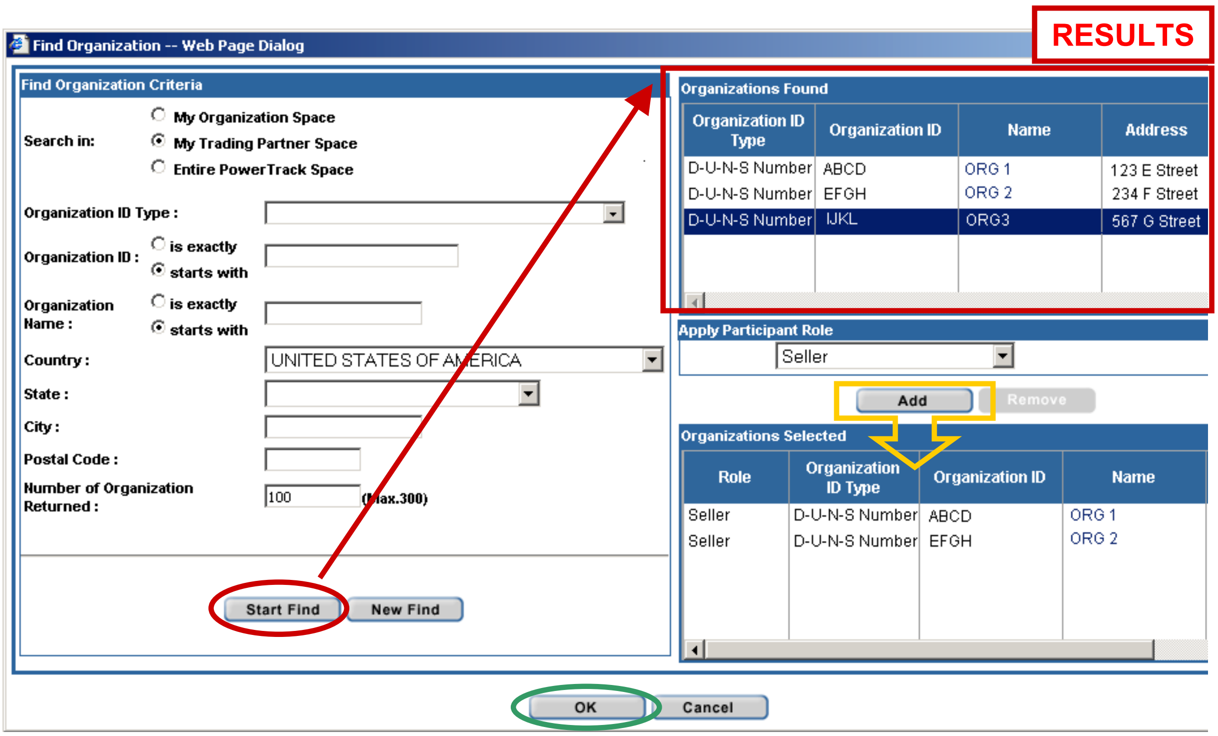
Click the Add button to select particular participants to add to your find criteria.

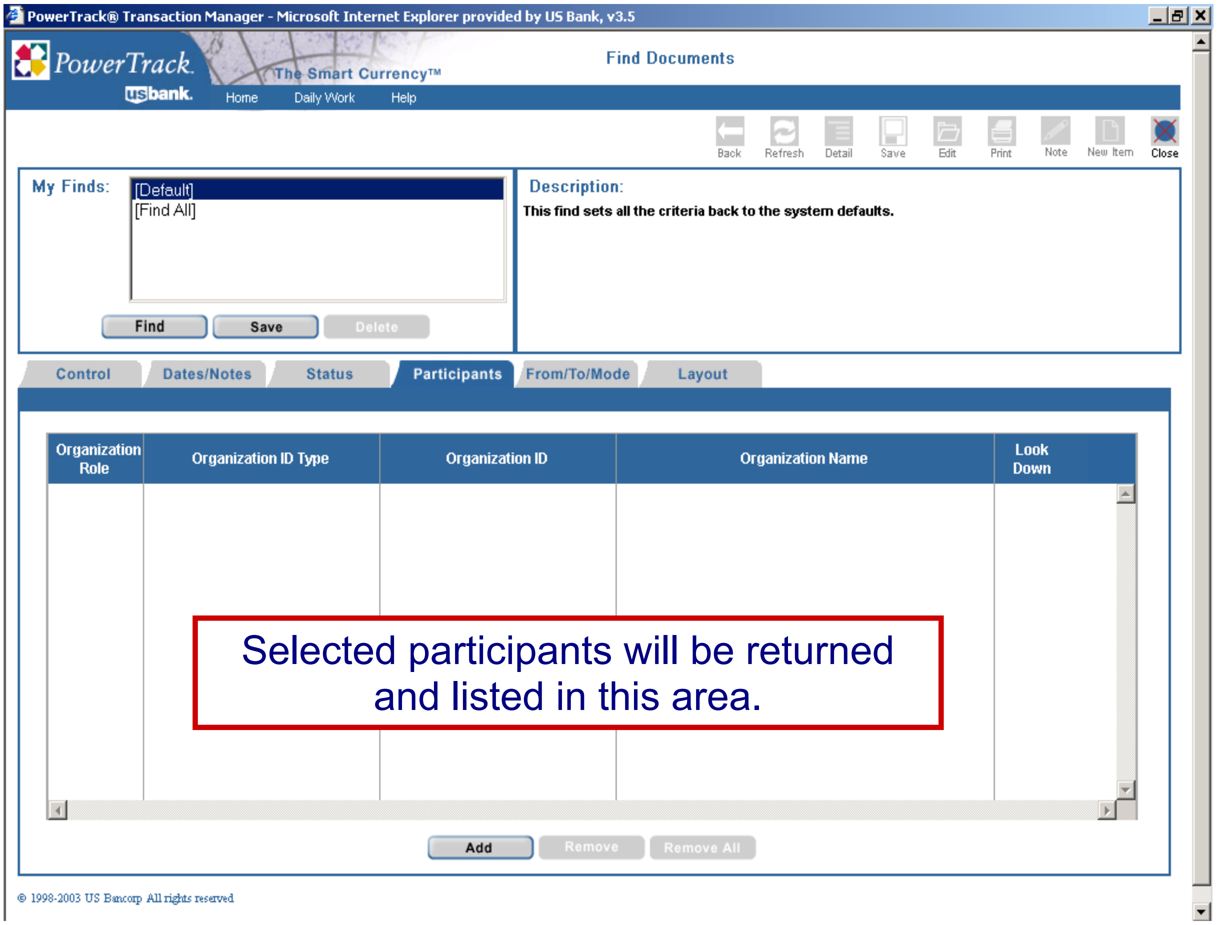


By just selecting My Organization Space, users will be selecting all documents within the user's Org. By choosing My Trading Partner Space, users can select one or a group of trading partners. This will narrow the Find to documents with those Trading Partners as participants. You can also select the Participant's Role so if you wanted to find all transactions where the Seller is Company A, you would select Company A, Change the drop down to Seller and click the Add button. This selection only adds this choice to your find.



Once you select your criteria and click the Start Find button, you will be presented with your Participants Find results on the top right. Then you can select a participant, select that participant's role and then click Add, this adds that participant to your list. Once you've added the participant, you can then click OK and your Participants selection will be returned in a list on the Participants Tab.




PowerTrack® Transaction Manager - Microsoft Internet Explorer provided by US Bank, v3.5
PowerTrack
The Smart Currency™
usbank.
Find Documents
Home
Daily Work
Help
Back
Refresh
Detail
Save
Edit
Print
Note
New Item
Close
My Finds:
[Default]
[Find All]
Find
Save
Delete
Description:
This find sets all the criteria back to the system defaults.
Control
Dates/Notes
Status
Participants
From/To/Mode
Layout
Organization Role
Organization ID Type
Organization ID
Organization Name
Look Down
Selected participants will be returned and listed in this area.
Add
Remove
Remove All
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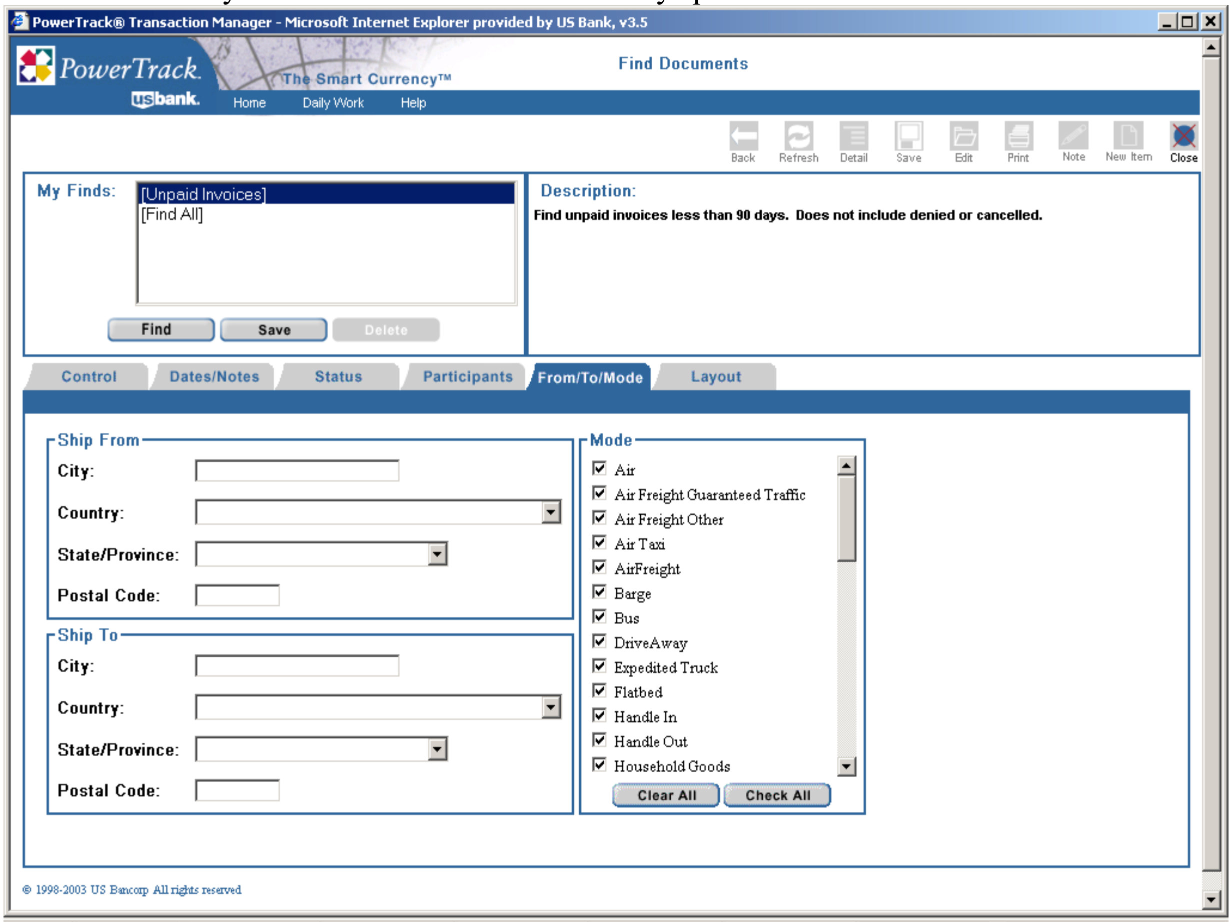
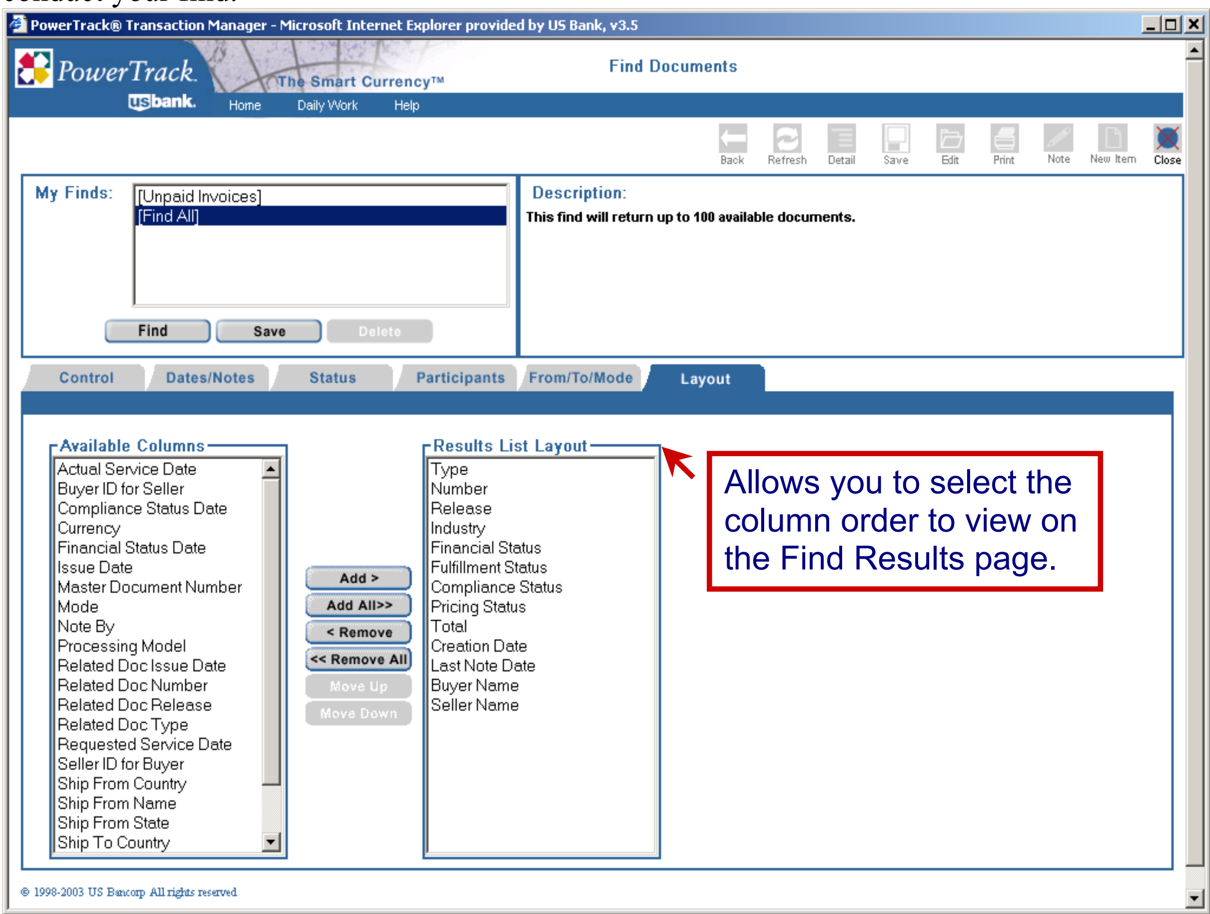
Here you'll see that users can search not only for documents with particular Ship From/To addresses but they can also search for documents by specific mode.

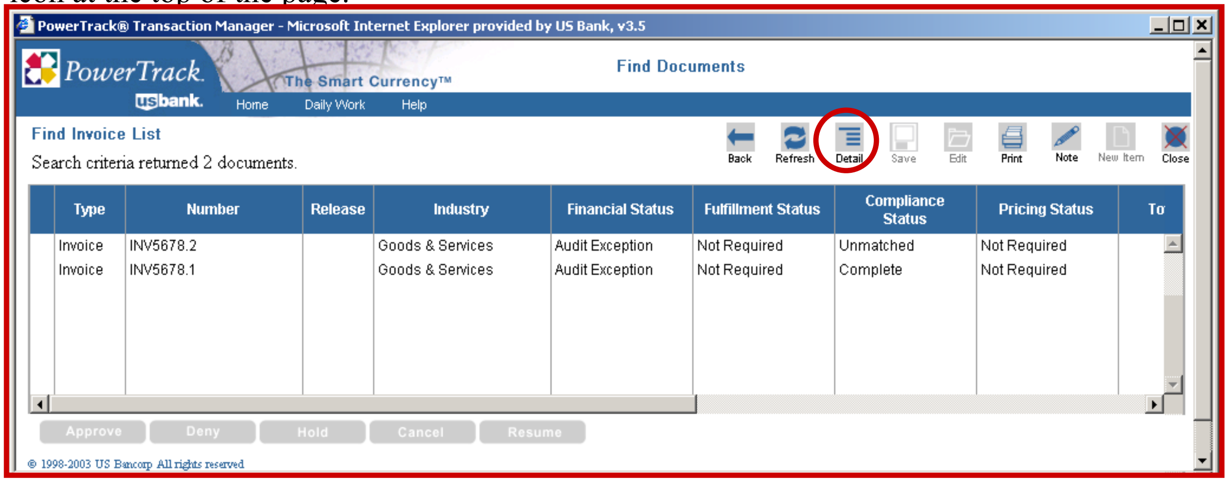


Not only can you select the columns you want displayed on the Find Results screen but you can also choose in which order they should be displayed. If you want your columns to always display in this order, you need to select the column Results List Layout you want and save the find.

Once you have selected all of your find criteria, you can save your find or just click Find to conduct your find.



Click on the Find button and you will be presented with all of the transactions meeting your find criteria. Select a transaction by clicking on it to highlight it and then click on the detail icon at the top of the page.



Highlight document you wish to view by clicking on the line, then click the Detail icon.